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Message Text

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INFO OCT-01 ISO-00 SP-02 ICA-11 AID-05 EB-08 NSC-05
TRSE-00 SS-15 STR-07 OMB-01 CEA-01 CIAE-00
COME-00 FRB-03 INR-10 NSAE-00 XMB-02 OPIC-03
LAB-04 SIL-01 AGRE-00 /091 W
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FM AMEMBASSY BERLIN
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PASS AGRICULTURE ELECTRONICALLY

E.O. 11652: N/A
TAGS: EAGR, GE
SUBJ: CONTINUING MARKET FOR U.S. AGRICULTURAL PRODUCTION AND OPPORTUNITIES FOR COOPERATION SEEN IN GDR

1. SUMMARY: AMBASSADOR, ACCOMPANIED BY AGATT, VISITED AGRA FAIR AT LEIPZIG-MARKKLEEBURG AND MADE FIRST KNOWN OFFICIAL U.S. VISIT TO ANIMAL PRODUCING UNITS AND TO MIXED FEED MILL. DETAILS OF JUNE 28-30 VISIT WILL BE SUBMITTED BY AIRGRAM. FRANK DISCUSSIONS WITH AGRA FAIR OFFICIALS, WITH REPRESENTATIVES OF AGMIN AND WITH
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LEADERS OF LOCAL AGRICULTURAL PRODUCING UNITS INDICATE THAT GDR OBJECTIVE OF HIGHER MEAT PRODUCTION WILL MAINTAIN AND EVEN INCREASE DEMAND FOR U.S. FEEDGRAINS AND SOYMEAL. EFFECTS OF HIGHER THAN EXPECTED DOMESTIC DEMAND FOR MEAT, THE DESIRE TO EXPORT MEAT FOR HARD CURRENCY, AND LINGERING IMPACT OF TWO POOR CROP YEARS COMBINE TO KEEP DEMAND FOR FEEDSTUFFS HIGH. WE BELIEVE

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CURRENT CROP GRAIN PRODUCTION SHOULD REACH 9.0 MILLION M.T. OR SLIGHTLY HIGHER, BUT WILL DEPEND HEAVILY UPON WEATHER AT HARVEST AND ABILITY GDR TO ORGANIZE HARVEST. WE HIGHLY IMPRESSED BY LARGE, PROFESSIONAL, ATTRACTIVE AND EFFECTIVE EXHIBITS AT AGRA FAIR--A PEDAGOGICAL EVENT WHICH ATTRACTS OVER 350,000 VISITORS AND IS LARGELY AIMED AT GDR AGRICULTURAL MANAGERS AND WORKERS. WE VIEW THIS FAIR AS OFFERING PRIME OPPORTUNITY FOR U.S. COOPERATIVE EFFORT AND FOR ACCOMPLISHING GOALS OF MARKET PROMOTION IN GDR. GDR AGRICULTURAL DEVELOPMENT, ALTHOUGH SUFFERING FROM IMPACT OF INSUFFICIENT INDIVIDUAL INCENTIVE AND ORGANIZATIONAL PROBLEMS, HAS STILL ATTAINED A MODEST DEGREE OF EFFICIENCY OF PRODUCTION. WE BELIEVE THAT THIS COURSE WILL BE MAINTAINED AND THAT AGRICULTURAL SECTOR WILL NOT REPEAT NOT BE SOURCE OF SERIOUS ECONOMIC OR POLITICAL STRAINS IN GDR IN NEXT FEW YEARS. END SUMMARY.

2. CROP PRODUCTION. GRAIN PRODUCTION IN SOUTH OF GDR APPEARS PROMISING. HARVESTING OF WINTER GRAINS HAS ALREADY STARTED. WITH SPARSER PRECIPITATION IN NORTHERN AREAS OF GDR, THE OUTLOOK IS LESS FAVORABLE. THROUGHOUT GDR WINTER GRAINS HAVE PROGRESSED BETTER THAN SUMMER GRAINS. NET RESULT SHOULD BE TOTAL GRAIN CROP OF 9.0 MILLION M.T. OR SLIGHTLY BETTER COMPARED LIMITED OFFICIAL USE

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WITH 8.65 MILLION M.T. IN 1977. THIS WOULD STILL BE SHORT OF THE RECORD PRODUCTION OF 9.7 MILLION M.T. IN 1974. FINAL RESULT WILL DEPEND ON WEATHER AT HARVEST AND ON EFFECTIVENESS OF NEW MEASURES TO INCREASE ORGANIZATIONAL EFFICIENCY OF HARVEST.

3. POTATO AND SUGAR BEET PRODUCTION. DESPITE POOR EARLY POTATO CROP BECAUSE OF MAY FREEZE, TOTAL POTATO PRODUCTION IN THE GDR SHOULD SCORE INCREASE OVER 1977 HARVEST OF 10.6 MILLION M.T. WE LOOK FOR ABOUT 11.5 MILLION M.T. THE GREATLY IMPROVED 8.3 MILLION M.T. PRODUCTION OF SUGAR BEETS HARVESTED IN 1977 SHOULD BE APPROXIMATELY DUPLICATED IN 1978.

4. MEAT SITUATION. THIS IS COMPLEX AND IT APPEARS THAT THE GDR PLANNERS MAY BE CHANGING SOME OF THEIR BASIC IDEAS UNDER THE LURE OF MEAT DEFICITS IN OTHER NATIONS. WE WERE TOLD PREVIOUSLY THAT MEAT PRODUCTION WOULD BE RAISED BY INCREASED FEEDING EFFICIENCY ALTHOUGH ANIMAL NUMBERS WOULD NOT RISE. HOWEVER, COMMENTS WERE HEARD, FOR INSTANCE AT MIXED FEED MILL VISITED, WHICH SUGGESTED THAT GDR WAS CONSIDERING

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SUBSTANTIAL EXPANSION OF MEAT PRODUCTION TO SUPPLY
ITS MARKETS IN EAST AND WEST EUROPE. RECURRENT REPORTS
OF MEAT SHORTAGES IN GDR ARE APPARENTLY TRUE, ALTHOUGH
CURRENT CONSUMPTION LEVELS OF ABOUT 82 KILOS PER CAPITA
OF RED MEAT FAR SURPASS EAST EUROPE CONSUMPTION AND
APPROACH THOSE OF U.S. SHORTAGE CAUSED BY COMBINATION
OF SHARPLY INCREASED DOMESTIC DEMAND; LINGERING
IMPACT OF DROUGHT OF 1976 AND MEDIOCRE HARVEST OF 1977
WHICH RESULTED IN SOME INCREASED SLAUGHTER AND LOWER
SLAUGHTER WEIGHTS; AND EXPORTS OF RED MEAT BOTH TO
DEFICIT COUNTRIES TO THE EAST, SUCH AS POLAND
(ACCORDING TO RUMOR ALSO TO ANGOLA AND CUBA) AND OF

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HIGH QUALITY CUTS TO WESTERN COUNTRIES. ITALY IS
REPORTED TO HAVE TAKEN LARGE NUMBERS OF CALVES, FRANCE
HAS IMPORTED PORK, AND WEST BERLIN IS STEADY MARKET.

5. IMPACT ON U.S. EXPORTS. EXTENSIVE DISCUSSIONS WERE
HELD AT MIXED FEED MILL VISIT AND AT ANIMAL PRODUCING

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ESTABLISHMENTS TO MEASURE IMPORT DEMAND FOR U.S.
FEEDSTUFFS. IT IS CLEAR THAT GDR IS DOING ALL IT CAN
TO REDUCE THIS DEMAND. STEPS TAKEN INCLUDE EFFORTS TO
RAISE GRAIN PRODUCTION AND GREEN FODDER PRODUCTION,
CONSTRUCTION OF MORE EFFICIENT ANIMAL PRODUCING UNITS,
AND A MASSIVE EFFORT TO PRODUCE CHEMICALLY TREATED
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STRAW PELLETS FOR CATTLE FEEDING. IN THE FIRST CASE,
AS REPORTED ABOVE, GRAIN PRODUCTION MAY INCREASE ONLY
MODESTLY OVER LAST YEAR. SECONDLY, THE NORTHERN
DROUGHT EXPERIENCED THIS YEAR WILL HAVE THE EFFECT OF
CUTTING TOTAL GREEN FODDER PRODUCTION. FINALLY,
ALTHOUGH GDR AIMS TO ACHIEVE PRODUCTION OF 3.5 MILLION
M.T. OF PELLETS BY 1980, WHICH IT HOPES WILL PROVIDE
30-40 PERCENT OF THE CATTLE RATION, STRAW IS COSTLY
TO HARVEST, STORE AND TREAT, AND RESULTS OF STRAW
FEEDING ARE REPORTEDLY NOT AS FULLY SATISFACTORY AS
HOPED. THE SIMPLE FACT IS THAT INCREASED EFFICIENCY
IN PRODUCTION OF MEAT WILL REQUIRE INCREASED IMPORTS OF
FEEDGRAINS AND SOYMEAL, AND THESE IMPORTS WILL LIKELY
COME FROM THE UNITED STATES.

6. AGRA FAIR ITSELF IS IMPRESSIVE 4-WEEK EVENT. FOCUS
OF EXHIBITS ON IMPARTING AGRICULTURAL INFORMATION AND
TECHNIQUES TO ESTIMATED 350,000 TO 500,000 VISITORS,
LARGELY WORKERS AND MANAGERS FROM LPG'S (COOPERATIVES).
ABOUT 5 PERCENT OF VISITORS FOREIGN, LARGELY FROM EAST
EUROPE. OF KEY INTEREST WERE DISPLAYS ON IRRIGATION,
AVIATION IN AGRICULTURE, CROP GROWING TECHNIQUES, AND
MACHINERY.

7. IRRIGATION OBJECTIVES INCLUDE 25 PERCENT CROP AREA
BY 1980. OVERHEAD PIPE AND ROTARY PIPE SYSTEMS CAPABLE
OF IRRIGATING 55 HECTARES DURING EACH 44-HOUR ROTATION.
TECHNOLOGY LARGELY OF USSR ORIGIN.

8. AVIATION FOR SEEDING, FERTILIZING AND DUSTING HAS
HIGH PRIORITY IN GDR. OF 250 AGRICULTURAL SERVICE
CENTERS, 140 CURRENTLY EMPLOY AIRPLANES. PILOTS
REPORTEDLY MUST RECEIVE AGRICULTURAL INSTRUCTION IN
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ADDITION TO PILOT TRAINING. GDR CLEARLY COMMITTED TO
FULL USE OF AVIATION IN AGRICULTURE.

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9. WIDE VARIETY MODERN FARM MACHINERY DISPLAYED AND DEMONSTRATED. TRACTORS RANGED FROM SMALL TO MAMMOTH 165 AND 300 HORSEPOWER SOVIET TRACTORS. WE HEARD SOME COMPLAINTS ABOUT OVERLY LARGE MACHINERY WHICH COMPACTS SOIL AND BOGS DOWN IN WET FIELDS. PRIDE OF GDR IS NEW FORTSCHRITT 516 COMBINE READY FOR FULL USE IN 1979. IT REPORTEDLY IS SUBJECT STRONG IMPORT DEMAND FROM EAST EUROPE AS WELL AS SUBSTANTIAL ORDERS FROM FRANCE. GDR HAS MADE RAPID STRIDES IN FARM EQUIPMENT PRODUCTION.

10. EXTENSIVE DISPLAYS DEVOTED TO TEACHING TECHNIQUES OF GARDENING AND SMALL ANIMAL RAISING ON PRIVATE PLOTS. THESE LIMITED TO ONE-QUARTER HECTARE PER PERSON AND ARE LEASED AT MINIMAL FEE. OBJECTIVE IS TO PROVIDE FOR VEGETABLE, FRUIT AND SMALL ANIMAL (RABBITS, DUCKS, GOATS) PRODUCTION WHICH RECEIVES INADEQUATE ATTENTION ON LARGE LPG'S. PRODUCTION MAY BE CONSUMED OR SOLD, AND ACCOUNTS FOR ABOUT 5 PERCENT OF GDR AGRICULTURAL OUTPUT.

11. WE ARE CONVINCED THAT 1979 AGRA FAIR IS PROPER LOCATION FOR PRESENTATION OF USDA/FAS-COOPERATOR SEMINAR OR LECTURE TO SELECTED GDR FARM MANAGERS, UNIVERSITY PROFESSORS AND GOVERNMENT OFFICIALS. A COORDINATED PRECISE APPROACH TO AGMIN WILL BE REQUIRED TO ACHIEVE THIS AND WILL BE SUBJECT OF SEP. TOFAS.
12. SOCIAL CONDITIONS. AT ALL DISCUSSIONS AT AGRA AND AT PRODUCING UNITS, WE HEARD DETAILED ACCOUNTS OF SOCIAL AND ECONOMIC BENEFITS ENJOYED BY WORKERS IN LPG'S. THESE INCLUDE ESTABLISHMENT OF 8-HOUR WORKDAY, REGULAR VACATIONS AT LPG-OWNED VACATION HOMES, MEDICAL FACILITIES, COMMUNITY RECREATIONAL FACILITIES, ETC. SPECIAL EMPHASIS ALSO PLACED ON CONSTRUCTION OF NEW HOMES FOR LPG WORKERS
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WITH FUNDS MADE AVAILABLE AT ONE PERCENT INTEREST TO WORKERS WHO AGREED TO STAY ON LPG FOR PERIOD OF 5 YEARS. THE BASIC OBJECTIVE IS TO RAISE THE WAGES AND WORKING CONDITIONS OF FARMWORKERS TO THOSE OF CITY WORKERS AND TO STEM THE LOSS OF QUALIFIED FARMWORKERS.

13. IN RESPONSE TO OUR QUESTIONS, WE RECEIVED DETAILED EXPLANATION OF HOW FARMWORKER REMUNERATION IS CALCULATED. IN FACT, ONE OFFICIAL DECLARED THAT GDR AGRICULTURE IS BASED ON "MONEY AND INCENTIVES." THREE BASIC FACTORS ARE, FIRST, INDIVIDUAL PAY, WHICH IS BASED ON LEVEL OF RESPONSIBILITY AND CAN RESULT IN AN LPG MANAGER'S JOB
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PAYING NEARLY DOUBLE THAT OF A FARMWORKER; SECONDLY, UNDER OR OVERFULFILLMENT OF ONE'S PLAN CAN REDUCE OR INCREASE PAY BY 10 PERCENT. FINALLY, OVERFULFILLMENT OF PLAN BY LPG CAN HAVE A POSITIVE IMPACT ON AN INDIVIDUAL'S SALARY.

14. THE BASIC STRUCTURE OF GDR AGRICULTURE IS THE LPG; THESE COOPERATIVES HAVE BEEN STRICTLY DIVIDED BETWEEN PLANT PRODUCING AND ANIMAL PRODUCING LPG'S. THE AVERAGE SIZE OF THE LARGER UNITS IS 5,000 HECTARES, AND OFFICIALS WITH WHOM WE SPOKE VOICED THEIR BELIEF THAT HIGH OFFICIALS IN GDR AGRICULTURE HAD DECIDED THIS WAS AN OPTIMUM SIZE AND HAD DECIDED NOT TO SEEK TO ORGANIZE LARGER STATE-OWNED FARMS. NEVERTHELESS,

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THERE ARE ALSO SOME STATE FARMS IN EXISTENCE AS WELL AS UNITS DEVOTED TO HORTICULTURE, CHICKEN PRODUCTION AND OTHER SPECIALIZED AREAS. WHEN AN ANIMAL PRODUCING LPG WISHES TO PURCHASE MIXED FEED OR GREEN FDDDER, IT ENTERS INTO DIRECT NEGOTIATIONS WITH THE FEEDMILL OR WITH THE PLANT PRODUCING LPG AND CONCLUDES A CONTRACT FOR A 1-YEAR PERIOD. PAYMENT FOR PRODUCTS IS GENERALLY MADE IN MARKS, ALTHOUGH SOME DIRECT BARTER OCCURS. PART OF PROFIT AT END OF YEAR IS AWARDED AS A BONUS TO LPG MEMBERS AND PART IS USED FOR CAPITAL IMPROVEMENTS OF LPG. IN ADDITION, A "TAX" IS PAID TO THE STATE.
15. COMMENTS: MOST OF WHAT WE HAVE OBSERVED ON THE TRIP REPRESENTED THE MORE HIGHLY AUTOMATED AND DEVELOPED SECTORS OF GDR AGRICULTURE, AND WE RECOGNIZE THAT THERE ARE MANY AREAS WHICH ARE STILL POORLY DEVELOPED. WE ALSO RECOGNIZE THAT MANY TECHNICAL PROBLEMS STILL EXIST, THAT THE ORGANIZATION AND MANAGEMENT OF LARGE PRODUCING UNITS IS NOT WITHOUT MANY SERIOUS PROBLEMS, AND THAT LACK OF INDIVIDUAL OWNERSHIP AND INCENTIVE
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INHIBITS PRODUCTION. (INTERVIEWS WITH FARMWORKERS DURING PRIOR TRIPS REVEALED A DEGREE OF DISENCHANTMENT WITH THE AGRICULTURAL SYSTEM AND WITH THEIR INDIVIDUAL LIVES--PHENOMENA NEVER APPARENT DURING THIS OFFICIAL VISIT.) NEVERTHELESS, THE SHAPE OF GDR AGRICULTURE IS CLEARLY DEFINED, AND WE EXPECT THAT THE EFFICIENCY OF THIS AREA WILL CONTINUE TO RISE, PERHAPS NOT IN LINE WITH EXPECTATIONS OF STATE PLANNERS, BUT STILL AT A PACE WHICH WILL CREATE NEITHER SEVERE ECONOMIC NOR POLITICAL STRAINS. END COMMENTS. BOLEN

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Message Attributes

Automatic Decaptioning: X
Capture Date: 01 jan 1994
Channel Indicators: n/a
Current Classification: UNCLASSIFIED
Concepts: MARKETS, AGRICULTURAL PRODUCTION, PRODUCTION, MARKET OPPORTUNITIES
Control Number: n/a
Copy: SINGLE
Draft Date: 07 jul 1978
Decaption Date: 01 jan 1960
Decaption Note:
Disposition Action: RELEASED
Disposition Approved on Date:
Disposition Case Number: n/a
Disposition Comment: 25 YEAR REVIEW
Disposition Date: 20 Mar 2014
Disposition Event:
Disposition History: n/a
Disposition Reason:
Disposition Remarks:
Document Number: 1978BERLIN04476
Document Source: CORE
Document Unique ID: 00
Drafter: n/a
Enclosure: n/a
Executive Order: N/A
Errors: N/A
Expiration:
Film Number: D780280-0332
Format: TEL
From: BERLIN
Handling Restrictions: n/a
Image Path:
ISecure: 1
Legacy Key: link1978/newtext/t19780787/aaaacvpx.tel
Line Count: 367
Litigation Code IDs:
Litigation Codes:
Litigation History:
Locator: TEXT ON-LINE, ON MICROFILM
Message ID: 3e6ce779-c288-dd11-92da-001cc4696bcc
Office: ACTION EUR
Original Classification: LIMITED OFFICIAL USE
Original Handling Restrictions: n/a
Original Previous Classification: n/a
Original Previous Handling Restrictions: n/a
Page Count: 7
Previous Channel Indicators: n/a
Previous Classification: LIMITED OFFICIAL USE
Previous Handling Restrictions: n/a
Reference: n/a
Retention: 0
Review Action: RELEASED, APPROVED
Review Content Flags:
Review Date: 05 may 2005
Review Event:
Review Exemptions: n/a
Review Media Identifier:
Review Release Date: N/A
Review Release Event: n/a
Review Transfer Date:
Review Withdrawn Fields: n/a
SAS ID: 2092784
Secure: OPEN
Status: NATIVE
Subject: CONTINUING MARKET FOR U.S. AGRICULTURAL PRODUCTION AND OPPORTUNITIES FOR COOPERATION SEEN IN GDR
TAGS: EAGR, GC, US
To: STATE
Type: TE
vdkvgwkey: odbc://SAS/SAS.dbo.SAS_Docs/3e6ce779-c288-dd11-92da-001cc4696bcc
Review Markings:
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